

Holds Maintenance

Display Hold

1. Click on the User Status Wizard. Scan, paste, or type a user ID in the Enter User ID or Name field. If you do not have the patron ID to scan, click Find User to display the Identify User window.

The screenshot shows the SirsiDynix interface with the 'User Status' tab selected. The 'Enter a User ID or Name' field contains '000188623' and the 'Find User' button is visible. The 'Clear' button is at the bottom left.

2. If the user has available holds, a notice box appears. Click the OK button to continue.

The screenshot shows the SirsiDynix interface with the 'User Status' tab selected. A notice box is displayed in the center, indicating that the user has available holds. The notice box contains the user name 'SMITH, ANDREW' and user ID '000188623'. The background shows a list of holds with columns for Title, Author, Placed, Expires, Pickup, and Status.

Pos	Title	Author	Placed	Expires	Pickup	Status
1	The absolutely perfect	Dunn, Marylois, 1	1/15/2010	NEVER	HARMON	Available

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3. Navigate to the holds section of the user record, click on a title in the holds list to highlight it, and click the Display Hold button.

The screenshot shows the SirsiDynix user record interface. The left sidebar contains navigation links: Check Out, Check In, User Status, Item Status, Holds, and Maintain Users. The main area displays user information for SMITH, ANDREW (User ID: 000188623, Profile: HIGH SCHOOL, Status: DELINQUENT). Below this is a list of holds. The first hold is highlighted, and a red arrow points to the 'Display Hold' button.

Pos	Title	Author	Placed	Expires	Pickup	Status
1	The absolutely perfect	Dunn, Marylois, 1	1/15/2010	NEVER	HARMON	Available
1	The valley of horses	Auel, Jean M.	1/15/2010	NEVER	HARMON	Unavailable

Buttons: Remove, Edit, Display Hold, Fill Hold

4. A pop-up box displays with complete information for that hold including the owning library, the pickup library, and the library where the hold was placed.

The screenshot shows the same user record interface, but with a 'Display Hold' pop-up box open. The pop-up box displays detailed information for the selected hold, including item ID, title, call number, current location, and pickup library.

Display Hold

Item ID: 23131100410584
Title: The absolutely perfect
Call Number: F DUNN, M
Current Location: HOLDS

Item Library: HARMON
Placed at Library: HARMON
Pickup Library: HARMON
Position: 1
Hold Placed: 1/15/2010
Expires: NEVER
No Hold Allowed Override: N
hold_level: COPY
Recall: STANDARD
Hold Range: GROUP
Status: Available
Notified:
Comment:

Buttons: OK, Help

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Edit Hold

1. Follow steps 1-3 under Display Hold. Click on a title in the holds list to highlight it, and click the Edit button.

The screenshot shows the SirsiDynix Circulation Reports window. The left sidebar has buttons for Check Out, Check In, User Status, Item Status, Holds, and Maintain Users. The main area displays user information for SMITH, ANDREW (User ID: 000188623, Profile: HIGHSCHOOL, Status: DELINQUENT). It also shows checkouts (9), holds (2), and amount owed (\$21.20). Below this is a table of holds with columns: Pos, Title, Author, Placed, Expires, Pickup, and Status. The first hold is for 'The absolutely perfect horse' by Dunn, Marylois, 1930- (Pos 1, Placed 1/15/2010, Expires NEVER, Pickup HARMON, Status Available). The second hold is for 'The valley of horses' by Auel, Jean M. (Pos 1, Placed 1/15/2010, Expires NEVER, Pickup HARMON, Status Unavailable). A red arrow points to the 'Edit' button below the holds table. Below the holds table is a 'Bills' section with a table showing a bill for 'Scary stories 3 : more tales to chill your...' (Date 1/14/2010, Item ID 25000007575070, Reason OVERDUE, Amount \$3.00).

Pos	Title	Author	Placed	Expires	Pickup	Status
1	The absolutely perfect horse	Dunn, Marylois, 1930-	1/15/2010	NEVER	HARMON	Available
1	The valley of horses	Auel, Jean M.	1/15/2010	NEVER	HARMON	Unavailable

2. A pop-up box displays to allow the entry of a comment or to change the pickup library. The Hold Expires field is not used for USD 500 schools. Make any changes desired and click the OK button to save changes.

The screenshot shows the same SirsiDynix Circulation Reports window as before, but with the 'Edit Hold' dialog box open. The dialog box contains the following information: Title: The absolutely perfect horse, Author: Dunn, Marylois, 1930-, Hold Level: COPY, Item ID: 23131100410584, Owning Library: HARMON, Hold Status, Queue Position: 1 of 1. It also has a 'This hold is first in the queue' message. The dialog box has fields for 'Hold Expires' (with a dropdown arrow), 'Comment' (with a text area), and 'Pickup Library' (with a dropdown menu showing 'HARMON'). There are 'OK' and 'Cancel' buttons at the bottom of the dialog box. The background window shows the same holds and bills information as the previous screenshot.

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Remove Hold

1. Follow steps 1-3 under Display Hold. Click on a title in the holds list to highlight it, and click the Remove button.

The screenshot shows the SirsiDynix Circulation Reports interface. The left sidebar contains navigation links: Check Out, Check In, User Status, Item Status, Holds, and Maintain Users. The main area displays user information for SMITH, ANDREW (User ID: 000188623, Profile: HIGH SCHOOL, Status: DELINQUENT). It also shows checkouts (9), holds (2), and amount owed (\$21.20). A table of holds is visible, with the first hold selected. A red arrow points to the 'Remove' button below the holds table.

Pos	Title	Author	Placed	Expires	Pickup	Status
1	The absolutely perfect	Dunn, Marylois, 1'	1/15/2010	NEVER	HARMON	Available
1	The valley of horses	Auel, Jean M.	1/15/2010	NEVER	HARMON	Unavailable

Buttons: Remove, Edit, Display Hold, Fill Hold

2. A verification box appears. Click the No button to quit or the Yes button to continue.

The screenshot shows the same SirsiDynix Circulation Reports interface, but with a confirmation dialog box overlaid. The dialog box has a question mark icon and the text 'Proceed with removing the hold?'. It has two buttons: 'Yes' and 'No'.

Dialog Box: Proceed with removing the hold? (Yes/No)

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3. The hold is removed.

The screenshot shows the SirsiDynix Circulation Reports window. The left sidebar has buttons for Check Out, Check In, User Status, Item Status, Holds, and Maintain Users. The main window displays user information for SMITH, ANDREW (User ID 000188623, Profile HIGH SCHOOL, Status DELINQUENT). It also shows checkout statistics (9 checkouts, 1 hold) and an amount owed of \$21.20. Below this is a table of holds with columns: Pos, Title, Author, Placed, Expires, Pickup, and Status. One hold is listed for 'The valley of horses' by Auel, Jean M., placed on 1/15/2010, with a status of 'Unavailable'. At the bottom, there is a 'Bills' section with a table showing a bill for \$21.20 on 1/14/2010. Buttons for 'Clear' and 'Return to Search' are at the bottom left.

Pos	Title	Author	Placed	Expires	Pickup	Status
1	The valley of horses	Auel, Jean M.	1/15/2010	NEVER	HARMON	Unavailable

Date	Title	Item ID	Reason	Amount
1/14/2010	Early stories 2: more tales to chill your	25000007575070	OVERDUE	\$21.20

4. If an available hold is removed, and the item belongs to another library, **it is very important** that the item is immediately scanned into the Check In Wizard. This removes the holds status from the item's current location and puts the item in transit to the owning library. Click the Yes button to put the item in transit.

The screenshot shows the SirsiDynix Check In Wizard window. The left sidebar has buttons for Check Out, Check In, User Status, Item Status, Holds, and Maintain Users. The main window has a 'Check In date is 3/5/2010' field and a 'Change Date' button. Below this is a table with columns: Item ID, Title, Call Number, Owing Library, and Bill A. A dialog box is open in the center with the message: 'This copy does not belong to the local collection. Item ID 25000007489595, Title Twilight, Call Number FICTION MEYER, Owing Library NORTHWEST. Do you wish to put it in transit?' with 'Yes' and 'No' buttons.

Item ID	Title	Call Number	Owing Library	Bill A
25000007489595	Twilight	FICTION MEYER	NORTHWEST	